

Delete a GL Account

Last Modified on 04/27/2022 2:46 pm EDT

GL Accounts may be deleted only if there has never been any activity in the account. If any activity has occurred in the GL Account, the User will only be able to set the account to inactive.

A few Basic GL Accounts are delivered with the software. These are accounts that the software needs to perform basic accounting functions. For these accounts, the delete button has been removed.

To delete a GL Account, from the main menu, arrive at the GL Accounts setup with this path: Setup > Accounting > Chart of Accounts.

The Chart of Accounts list will be displayed. Locate the GL Account you want to delete, and then click on the Delete button.

Note: When the User selects Yes to accept the deletion of the record, this does not delete the value from the database, however marks the record as “Inactive”. In most cases, if a setup value was previously marked as “deleted”, a user is able to re-activate the deleted [inactivated] record. When selecting to view Inactive Only records, items that were previously “deleted”, will appear in the inactive list.

A confirmation message will be displayed. Click the Yes button to proceed with the deletion (inactivation) of the record.

